SFA Human Resources
Monthly Implementation Report

September 27, 2000

Accomplishments:

SFA HR Modernization Plan and Implementation Strategy
(Short Term)

☑ Received the 201 series Position Description templates and initiated development of Position Descriptions

☑ Updated HR Partner Manager and Recruiting Lead Position Description/Knowledge, Skill and Ability documents to new series and HRG standards

☑ Drafted Position Description/Knowledge, Skill and Ability documents for HR Service Center Manager and Performance Management Lead

SFA HR Modernization Plan and Implementation Strategy
(Long Term)

☑ Developed draft of Human Capital Long-Term Plan

SFA Skill Model Development

☑ Compiled the SFA Skill Catalog incorporating professional, managerial and functional skill comments

☑ Revised and submitted the SFA Skill Catalog to Calvin and John for initial review

☑ Finalized and submitted the SFA Skill Catalog

☑ Designed and developed the Skills Assessment Job Aid

SFA HR Performance Development Process

Communication

☑ Met with the Performance Development Team to provide an update on the direction of Performance Development activities and SFA's selection of Perform.com

☑ Developed a Fact Sheet for the new Performance Development Process

☑ Developed Performance Development Process Deployment Plan (pilot, communications, education) for rollout of Performance Development Process

☑ Developed a Benefits one-pager to explain the benefits of the new SFA Performance Development Process to the Leadership Team

☑ Developed a diagram depicting the Performance Development Process using four steps: Goal Setting/Expectation Setting, Mid-Point Discussion, Feedback Rating and Feedback Development Session

☑ Met with HRG and OGC to discuss compliance with regulations and codes in developing the new Performance Development Process

☑ Drafted posters according to the Deployment Plan (will hold until decision is made to communicate with employees)

☑ Drafted Performance Development Process communications, i.e. Inside SFA article, draft emails, SFANet announcement (hold until appropriate approval has been received from Calvin)

☑ Developed Agenda, Talking Points, a listing of anticipated questions and draft email for use in preparing for Regional Union Meetings to be facilitated by Calvin and John with a focus on communicating initial messages about the new SFA Performance Development Process

☑ Drafted "Performance Development Process" Status Update and Fact Sheet for Calvin's use in the Leadership Team Meeting

☑ Developed Performance Development Process one-pager documenting benefits, critical success factors and process diagram for use in communicating with SFA Leadership Team and stakeholders

☑ Developed talking points for Calvin to discuss during SFA Leadership Team Meeting

☑ Developed rollout timeframe options, showing approach assumptions, and risks associated with three (3) possible rollout dates of Perform.com

Job Aid

☑ Initiated the design and development of the Performance Development Process Job Aid

☑ Drafted Job Aid to validate with Perform.com subject–matter experts

☑ Designed Training Approach for Performance Development Process implementation

☑ Drafted PBO Coaches Train-the-Trainer Agenda

Process Definition

☑ Developed an equivalent "Personnel Manual Instruction" document based on the current codes and regulations to explain SFA's new performance development process for submission to HRG for approval

☑ Ensured that the Performance Development Process is in compliance with all related codes and regulations (discussed with HRG and OGC as needed)

Perform.com

☑ Perform.com demonstrated the updated IDP and Open Comments pages and began discussions regarding further configuration of the tool to meet SFA's needs

☑ Gathered a comprehensive listing of all SFA email addresses and GPAS data (showing evaluator relationships) and sent to Perform.com for loading of participants into the database

☑ Worked with Perform.com to configure the site (Comments and IDP) to meet SFA's needs

☑ Participated with HR Team in a 'learning session' facilitated by Perform.com

☑ Loaded SFA employee data into Perform.com database

Deliverables

☑ Submitted Deliverable 30.1.6b Monthly Implementation Report to Calvin and Carol Seifert

☑ Submitted Deliverable 30.1.4b Working Session Summaries to Calvin and Carol Seifert

Next Steps:

**SFA HR Modernization Plan and Implementation Strategy
(Short term)**

- Assist in the approval process for the Human Resources Organization structure

- Draft remaining Position Descriptions/Knowledge, Skills, and Abilities for new HR positions

SFA Performance Development Process

- Finalize configuration of Perform.com site for phase one roll-out

- Conduct user-testing on Perform.com site for phase one roll-out

- Begin to schedule and arrange training logistics for pilot and rollout of Performance Development Process

- Partner with two SFA employees from Financial Partners to create Performance Development Process: Step 1 Sample for SFA Leadership Team review

- Coordinate a demonstration of Perform.com site for SFA Leadership Team

- Conduct pilot of Performance Development Process – educate/communicate prior to pilot and analyze feedback following pilot

- Finalize and deliver the Train-the-Trainer session to PBO Coaches

- Oversee the delivery of Information Sessions to SFA employees

- Develop proficiency scale education document for use in working sessions with General Managers/Directors and Leadership Teams

- Develop strawmodel Proficiency Samples on identified Functional Skills for all organization units

- Conduct working sessions with SFA Leadership Teams to define Proficiency Levels

- Revise SFA Skill Catalog to include proficiency definitions

- Add proficiency definitions to Perform.com site on Skill Profile tab

- Develop plan to incorporate Organization Balanced Scorecard into later release of Performance Development Process